SiteManager Training Manual

Module A
Chapter 1

Contract Administration
Contract Records
Correspondence Log

Section A-1-2-11

Creating a Correspondence Log

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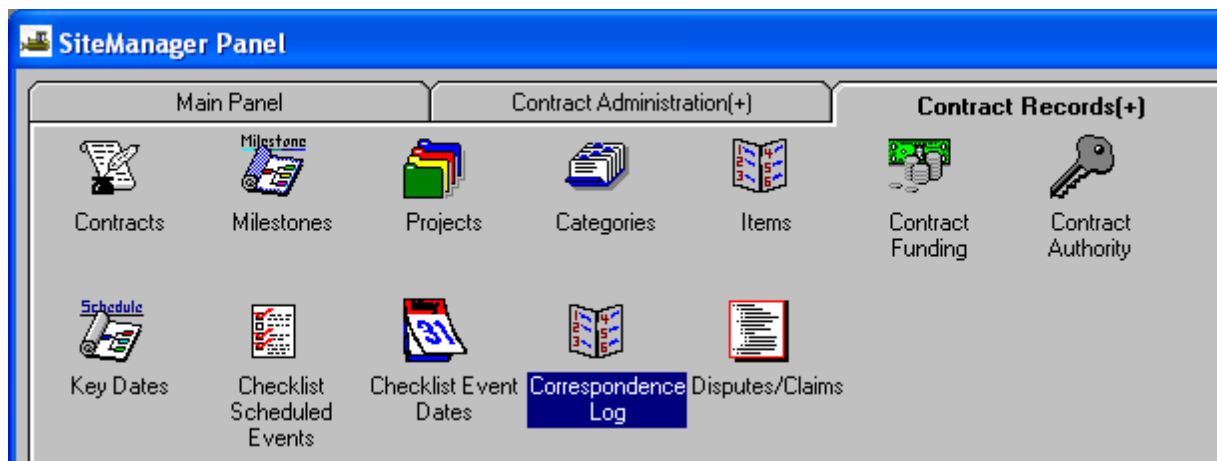
Creating a Correspondence Log

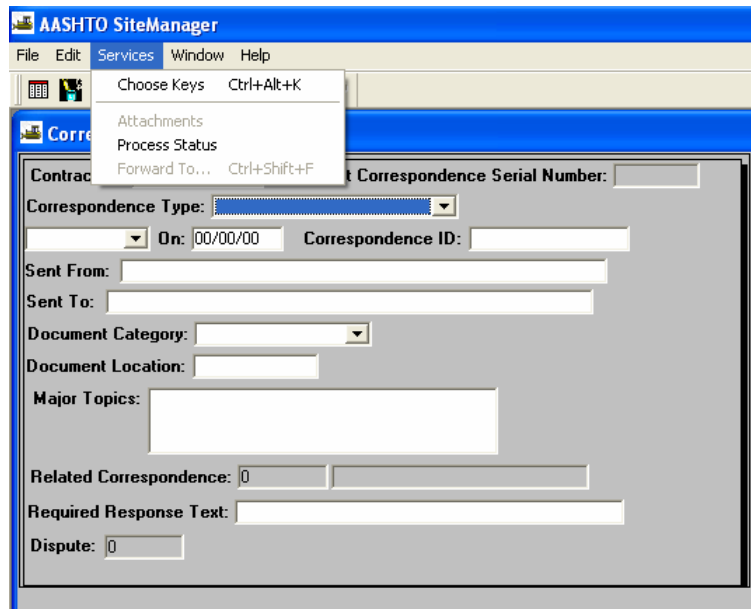This module explains how to create a correspondence log.

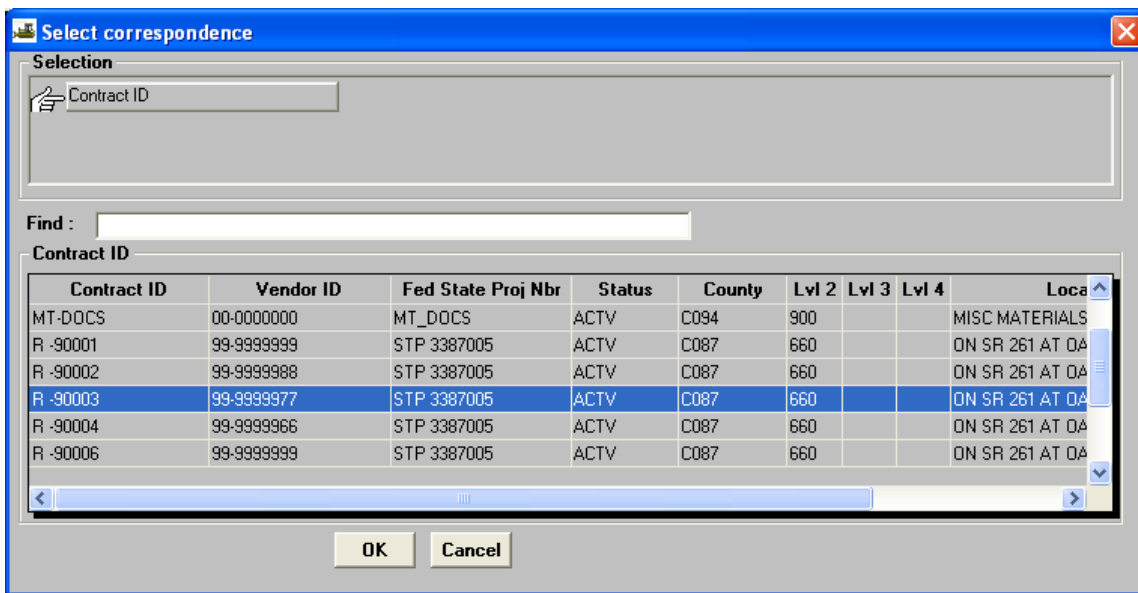"Double-click" on **Contract Administration (+)** located on the Main Panel.

"Double-click" on **Contract Records (+)**.

"Double-click" on **Correspondence Log**.

"Click" on **Services** then "click" on **Choose Keys**.

"Double-click" on the appropriate **Contract ID**.
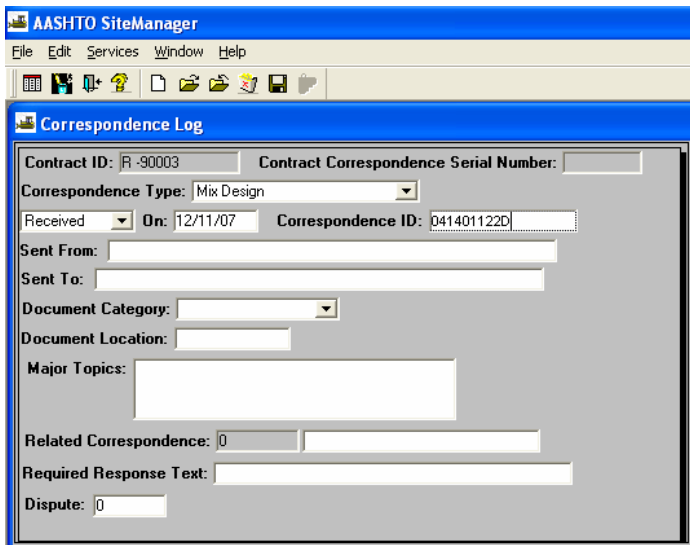
Correspondence Type: **Correspondence Type** is a general description of the document.   The selections includes;

- Approved Material
- Mix Design
- Permits
- Change Orders
- Pre-letting Questions
- Traffic Control Plan
- Contract Time
- Inspection Report
- Drawing
- Suggestion
- Complaint

"Click" on the appropriate **Correspondence Type** from the drop-down list.

"Click" on the drop-down list located to the left of **On**: and "click" the appropriate selection, **Received** or **Sent**.

On: The **On** field indicates the date the correspondence was received or sent. The date cannot be greater than the current date.

"Enter" the appropriate date in the field located to the right of **On**.

Correspondence ID: The **Correspondence ID** identifies the correspondence log record. The ID consists of the following data:
- SUPERPAVE mix design ID
- PCC mix design ID
- Approval number for Approved Material
- Project Correspondence Serial Number (optional)

"Enter" the identifier in the **Correspondence ID** field.

Sent From: **Sent From** is company or agency sending the document. "Enter" the appropriate name in the **Sent From** field.

Sent To: **Sent To** is the name agency receiving the document. "Enter" the appropriate name in the **Sent To** field.

Document Category: **Document Category** further defines the type of correspondence. The selection includes:

- Approved Material
- Concrete Mix Design
- Superpave Mix Design
- Change Orders
- Contract Time
- Contractor
- General
- Other
- Outside Entry
- Permit
- Traffic Information
- Blank

"Click" on the **Document Category** drop-down list and "click" the appropriate selection.

Document Location: **Document Location** is the stored location of the actual document "Enter" the appropriate location in the **Document Location** field.

Major Topics: **Major Topics** will hold any other information for the subjects of the correspondence.

"Enter" the main subjects of the correspondence in the **Major Topics** field if applicable.

Related Correspondence: **Related Correspondence** are other correspondences that have been entered into the correspondence log that pertains to this correspondence. Only those correspondences that are associated to the current Contract ID can be associated to the correspondence log.

"Right-click" on the **Related Correspondence** field.

"Click" on **Search**.

"Double-click" on the appropriate **Corr Srl Nbr**, if applicable. If there are no previous correspondences logged, this window will be empty.
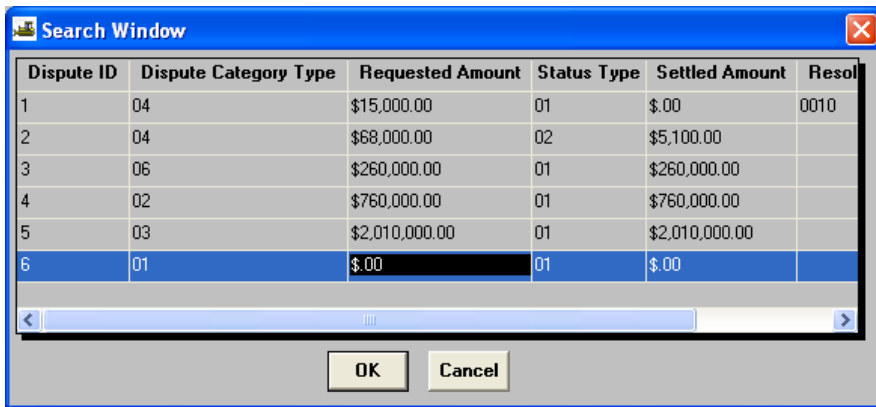

Required Response Text: The **Required Response Text** field is not be utilized for MT-DOC correspondences.

Dispute: The **Dispute** field is used to identify the Dispute Case number related to the document when it is part of a contractor claim or dispute.
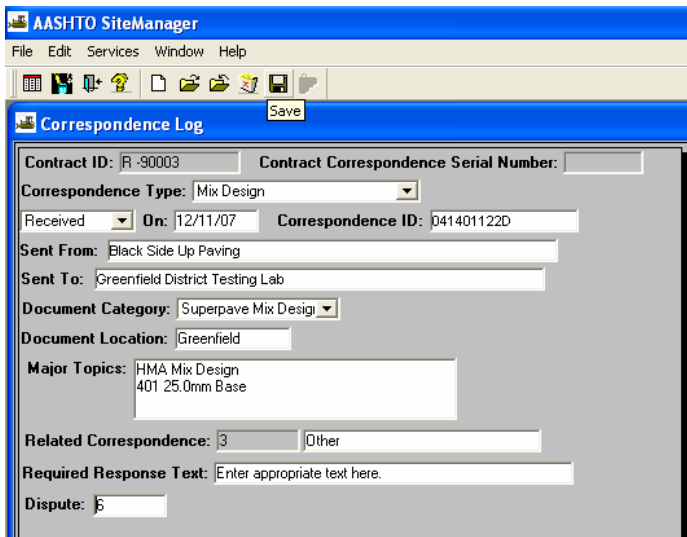
"Right-click" on the **Dispute** field.

"Click" on **Search**.

"Double-click" on the appropriate **Dispute ID**, if applicable. If there are no previous correspondences logged, this window will be empty.

"Click" the **Save** 🖫 button located on the toolbar

The **Contract Correspondence Serial Number** will automatically be populated.

Refer to training document **A-2-11-2 Attaching a Document** for instruction on attaching a document.

Creating a Correspondence Log

A-1-11-1 Group Exercise
In the following exercise you will complete a correspondence log for PCC Mix Design
043702122P.

Log into SiteManager as update
Password   pass

Navigation from **Main Panel:**
      Double-click: **Contract Administration (+)** icon
      Double-click: **Contract Records (+)**icon
      Double-click: **Correspondence Log** icon
      Click the **Open** button
      Contract ID   Select   MT-DOCS
      Corr Srl Nbr   Select   2

Document Category   Select   Concrete Mix Design
Document Location   Enter   Greenfield
Major Topics   Enter   702 Class A Concrete

Click on the **Attachments** button
Click on the **New OLE** button
Click on the **Create From File** tab
Click on the **Browse** button
Locate file named PCC Mix design 043702122P.pdf located in the
C:\SMTRNG\Training Attachments folder
Click the **Open** button.
Click the **OK** button.
Name: "Enter"   043702122
Description: "Enter"   043702122P Concrete Mix Design
"Click" the **Add All** button located at the bottom of the panel.
"Click" the **Add** button located on the bottom of the OLE Attachment window.
"Click" the **Save** button located on the toolbar.
"Click" the **Attachment button** to close this panel
"Click" the **Close** button located on the toolbar.